



# USA Performance<sup>®</sup>

**Manage Performance, Ensure Success**

OPM's Performance Management System for Federal Agencies

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Abbreviated version for NIH use | October 2018

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*USA Performance (USAP) is an automated, web-based tool that assists Federal agencies in the implementation of their Senior Executive Service (SES) and non-SES performance management programs and systems. USAP enables agencies to automate their performance appraisal process throughout the entire performance rating cycle. Agencies can develop performance plans, track and monitor employees' performance, provide feedback and ratings, and electronically sign performance plans.*

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## SENIOR EXECUTIVE USER GUIDE

**NIH Administrators**

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## Part 1: General Information

### BEFORE YOU BEGIN

- USA Performance currently works with Internet Explorer version 10 and above and Google Chrome version 39 and above.
- Your access to the system will be provided by your [NIH Administrator](#). You will receive two emails from USAPHelp@opm.gov – one with your username and one with your password.
- You must be inside the NIH/HHS firewall or VPN to open the link and see the login page below

### Login

Sign In using your PIV card or Email Address and Password

- Access [USA Performance](#)
- Type in your work email address
- Enter the temporary password provided to you in the automated email
- You will be prompted to change your password
- Read and accept the Rules of Behavior. You will be directed to the USA Performance Home page.

**NOTE:** Once you initially log into USA Performance with the temporary password, you may try registering and logging in with your PIV card

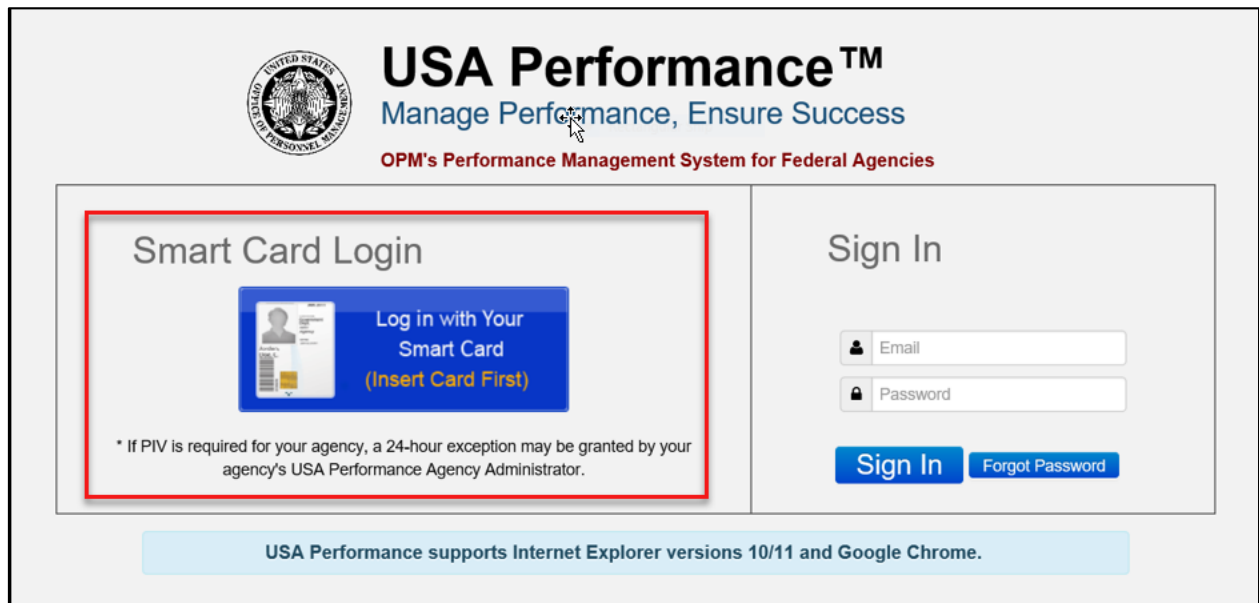
*Registering your PIV Card for the first time:*

- Access [USA Performance](#)
- Click the “Log in with your Smart Card (Insert Card First)” icon
- Certificates will become available to select
- Select the authentication certificate. Only certificates ending in .8, .12 or .14 will be accepted. Do not select the “signature” certificate (ending in .7). To detect which certificate is correct, perform the following:

- Click on one of the certificates and then click “Click here to view certificate properties.” Scroll down on the “General” tab and you’ll see a string of numbers. Use this to determine if you have the right certificate.
- Enter your PIN
- After your PIN has been accepted, you’ll be able to access USA Performance with your PIV for future logins.

#### Smart Card Login:

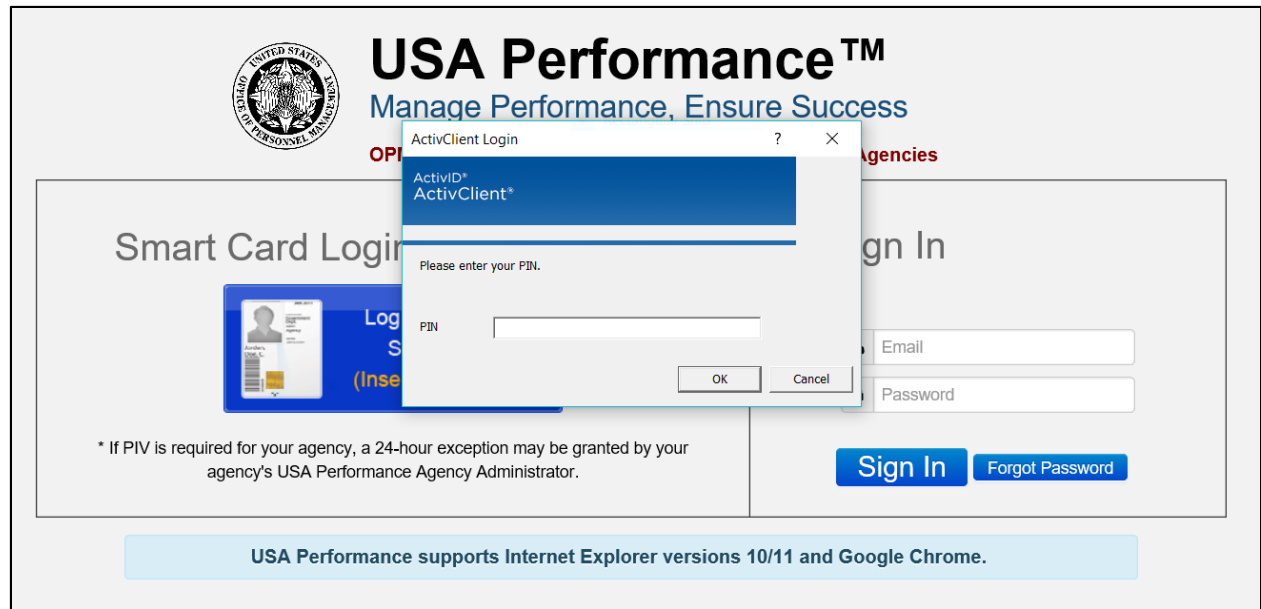
- To access USAP navigate to the [USA Performance](#) site
- Click on the “Log in with your Smart Card (Insert Card First)” icon



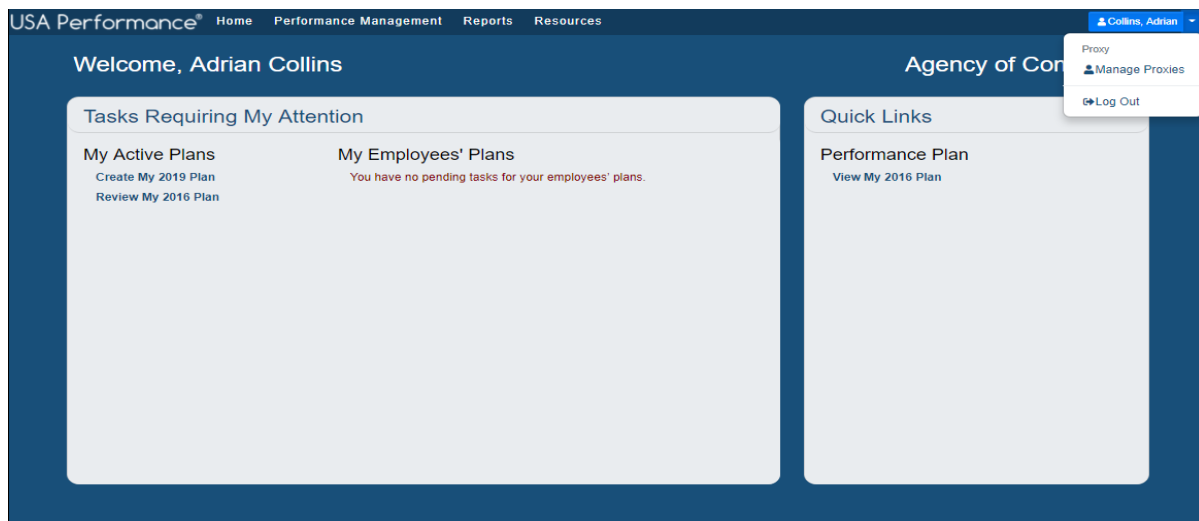
- Select the authentication certificate



- Enter your PIN



- You will be directed to the USA Performance Home page.



### Password Requirements:

- Your password must be at least eight (8) characters with at least 3 of the following attributes:
- At least one number 0-9
- At least one upper-case letter A-Z At least one lower case letter a-z At least one special character !\*?
- Passwords expire every 120 days.
- If you forget your password, click Forgot Password on the login page. Check your junk folder for a system generated email with the temporary password.
- If you enter the wrong password three times in a row, your account will be locked for 30 minutes. After 30 minutes, you will be able to access USA Performance with your most current password.

## Assign a Proxy User

Each user has the ability to assign a proxy for their account. Proxy users can log into USA Performance on behalf of an Executive or Rating Official to edit aspects of their performance plans. This includes appraisal period, performance requirements, weights, and strategic alignment.

- Proxy users **cannot** sign performance plans.



1. From the Home page, click the dropdown in the upper right-hand corner of the navigation bar and select **Manage Proxies**.
2. Under the **Available Users** section, select **Add as Proxy** for the individual that you would like to assign as proxy user. You may add more than 1 proxy. (If the name does not appear, contact your [NIH Administrator](#) to request the addition of the individual's name to the system.
3. The name will appear under the **Proxies** section and that user will now have the ability to execute the functions of a proxy user.
4. Select **Save Changes** to confirm the addition of the proxy to the account.

A screenshot of the 'Available Users' and 'Proxies' sections in the USA Performance interface. The 'Available Users' section has a search bar and a table with columns: Name, Login, Role, Status, and Action. The table lists five users: Grant, Lyla; Humphries, Charlie; Johnson, Janet; Kaiser, Rick; and Labor, Bob. Each user has an 'Add As Proxy' button. Below the table is a 'Show 5 entries' dropdown and pagination controls. The 'Proxies' section is below, with a 'Save Changes' button circled in red. The 'Proxies' section also has a search bar and a table with columns: Name, Login, Role, Status, and Action. The table lists one user: Dorsey, Jeremy, with a 'New Proxy' button.

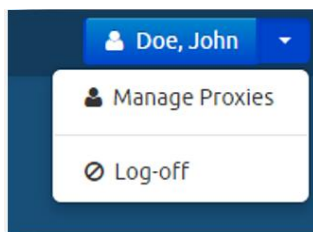
## Part 2: System Navigation

### BEFORE YOU BEGIN

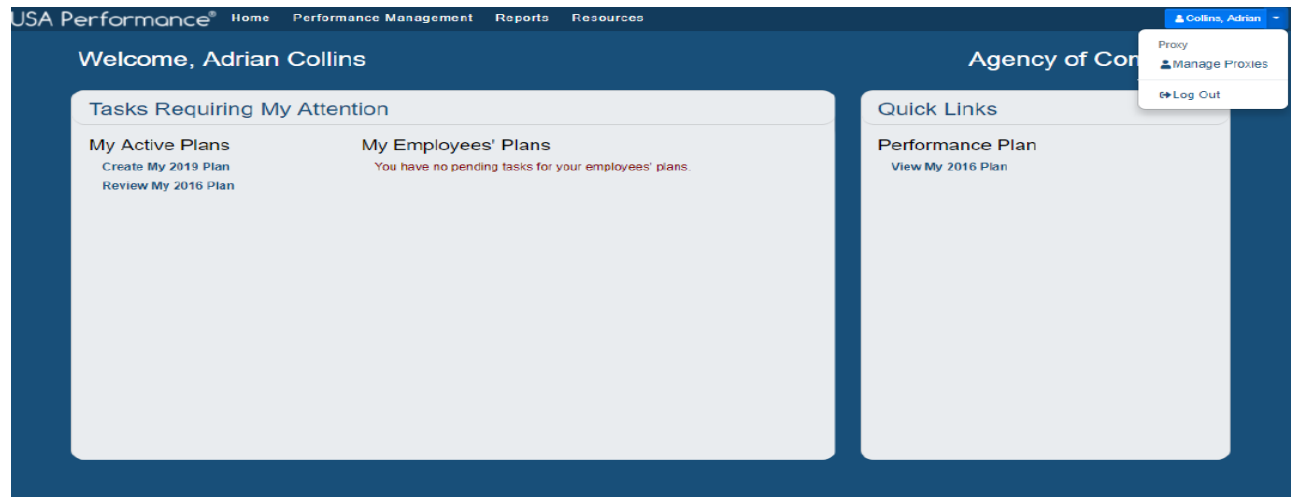
- Note your notifications and dashboard configuration are based on your user role, permissions, and rating cycle.



1. Login.
2. **Home** page will display. The navigation bar includes the following tabs:
3. **Home**—This button returns you to the **Home** page where you can see the **Dashboard** of your performance management actions and alerts.
4. **Performance Management**—This button takes you to the Performance Management section of the system, which has three tabs: Planning, Monitoring, and Rating.
  - **NOTE:** This section is for executives who are also rating officials. Specific instructions for rating officials can be found in the **USAP GUIDE FOR RATING OFFICIALS** located on the USA Performance OHR page here: <https://hr.nih.gov/hr-systems/usa-performance/usa-performance-user-resources-and-training>. Each tab enables you to view which employees are at each phase of their performance plans. If you are unable to find an employee within a certain tab, it is likely because they are at a different phase, which requires referencing the other tabs. Within each tab, you can take action on employee performance plans such as viewing or signing the plans. Any necessary action will be indicated for each employee.
5. **Reports**—Allows you to run an **Evaluation Report**.
6. **Resources**— Provides USA Performance resources and reference materials.
7. **User Profile**—Your login in name will appear on the user profile dropdown. Click the dropdown to
8. **Manage Proxies** or Logoff.



## Dashboard



When you first log in to USAP, you will be taken to the Home/Dashboard page with a Navigation bar at the top of the page with three buttons: [Home](#), [Performance Management](#), and [Resources](#). This Navigation bar appears at the top of every page. In the upper right-hand corner is the user profile dropdown, which can be used to logoff or initiate proxy settings (explained later in this training).

The Dashboard enables you to see the status of your performance plan (if applicable) and alerts you of tasks you need to complete. It is organized into two sections: “Tasks Requiring My Attention” and “Quick Links.”

**Tasks Requiring My Attention:** This section provides you with the tasks requiring your attention regarding your performance plan in the system. Under this heading, there is a subheading titled “My Active Plans” that provides links to pending tasks for your plans that are active.

**Quick Links:** This section has a subheading titled “Performance Plan” with quick links to prior years’ performance plans.

### System Email Notifications

When certain tasks requiring user action are generated on the Dashboard, it triggers a notification email detailing what needs to be done. Email notification will be sent to the executive for the following actions:

- Sign plan after Rating Official signs Part 1
- Sign for progress review after Rating Official signs Part 2
- Sign for rating after the Rating Official or Reviewing Official signs Part 3
- Notify when plan is signed by Appointing Authority



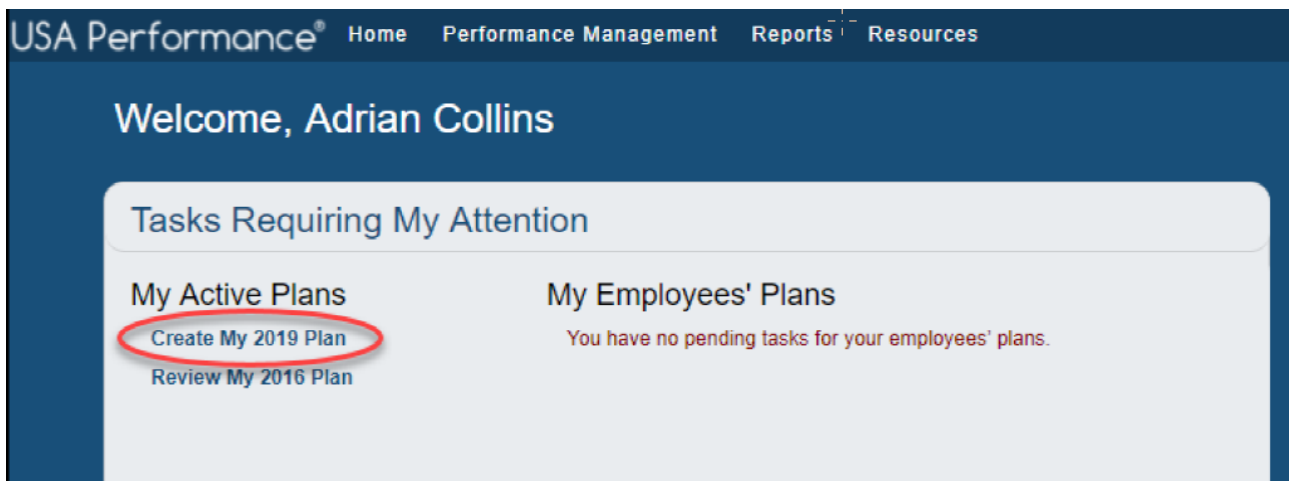
## Part 3: The Planning Phase

### BEFORE YOU BEGIN

- Prior to signing the performance plan in USA Performance, the rating official and the executive must first meet to discuss the details of the plan.
- The rating official and the executive are each required to sign the performance plan individually. Proxy users will not be able to sign on their behalf.

### Create a performance plan

1. From the Home/Dashboard page, under the **Tasks Requiring My Attention** section, click **Create My 2019 Plan**



### Creating a performance plan allows you to take the following actions:

- ✓ Enter appraisal period dates
- ✓ Add additional text to the Critical Elements to include agency-specific requirements
- ✓ Add a performance requirement and provide strategic alignment
- ✓ Edit or remove performance requirements
- ✓ Add supporting documentation
- ✓ Sign plan as an Executive

### Import a Performance Plan from a Previous Year

1. After clicking **Create Plan**, you may see an option to **Import from Previous Plan**. This option will only appear if you had a performance plan in USAP in the previous performance management (PM) cycle.
2. When you select **Create Plan**, a prompt may appear asking if you want to import the data from the previous performance plan.
3. Choose **Yes** or **No**.

4. Selecting **Yes** for this option will copy the contents from **Part 1. Consultation**, any agency-specific requirements for the critical elements, weight settings, and the performance requirements and strategic alignment.

Import from Previous Plan

Do you want to transfer data from the previous evaluation to this new one?  
A preview of the transferred evaluation is below.

If you click "Yes", you must Save the evaluation in order keep the changes.

## Navigate the Performance Plan

1. The navigation bar at the top of the performance plan assists you with completing the plan. Items on the navigation bar link to the following actions: **Consultation**, **Progress Review**, **Rating**, **Formula**, **Critical Elements**, **Narratives**, **Documents**, **Notes**, **Save**, and **Print**. An icon with a red circle and a backslash indicates the action is not available at the current phase.



- **Consultation**—This button takes you directly to **Part 1. Consultation** of the performance plan.
- **Progress Review**—This button takes you to **Part 2. Progress Review** of the performance plan.
- **Rating**—This button takes you to the summary rating portion of the performance plan.
- **Formula**—This button takes you to the derivation formula section of the performance plan.
- **Critical Elements**—This button takes you to **Part 5. Critical Elements**, where Executives and Rating Officials can add text or enter critical element weights.
- **Narratives**—This button takes you to **Part 6. Summary Rating Narrative** and **Part 7 Executive's Accomplishment Narrative** where Executives and Rating Officials can complete the narratives for the performance plan.
- **Documents**—This button takes you to the **Employee Documents** section where you can upload additional documents to append to the performance plan.
- **Notes**—This button takes you to the notes section of the performance plan where general notes can be added to the performance plan. If you move your cursor over the **Notes** icon, it will show the last time the notes section was updated.
- **Save**—This button saves any changes made to the performance plan.

- **Print**—This button enables you to print a hard copy of the performance plan.

## Enter Appraisal Period Dates

1. **Establish appraisal period start date**--Select the first box next to **Appraisal Pd.** and enter the appraisal starting date in the calendar dropdown (usually October 1)
2. **Establish appraisal period end date**--Select the second box next to **Appraisal Pd.** and enter the appraisal end date in the calendar dropdown (usually September 30)

**Part 1. Consultation.** *I have reviewed this plan and have been consulted on its development.* Plan Status: Active

Executive's Name (Last, First, MI): \_\_\_\_\_ Appraisal Pd. 10/1/2018 - 9/30/2019

Executive's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Title: \_\_\_\_\_ Organization: Natl \_\_\_\_\_

Rating Official's Name (Last, First, MI): \_\_\_\_\_ ☐ CA

Rating Official's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

1. Consultation 2. Progress Review 3. Rating 4. Formula 5. Critical Elements 6, 7. Narratives Documents Notes Save Print

**Critical Element 1. Leading Change** (Minimum weight 5%) Weight 10 %

**Mandatory Performance Requirement:** Develops and implements an organizational vision that integrates key organizational and program goals, priorities, values, and other factors. Assesses and adjusts to changing situations, implementing innovative solutions to make organizational improvements, ranging from incremental improvements to major shifts in direction or approach, as appropriate. Balances change and continuity; continually strives to improve service and program performance; creates a work environment that encourages creative thinking, collaboration, and transparency; and maintains program focus, even under adversity.

**Agency-Specific Performance Requirements:**

Agency specific requirements critical element 1

## Add Text to Critical Elements

### Add text to Critical Elements 1-4

1. For Critical Elements 1-4, agency- specific performance requirements may be added to the standard element language.
2. Place your cursor in the text box under **Agency-Specific Performance Requirements. For NIH SES, SL (Supervisors), and SENIOR-LEVEL TITLE 42 EMPLOYEES—Refer to the current year guidance**

3. Insert the additional text.
4. Click **Save** at the top of the page.



**TIP:** Due to system timeouts, we recommend drafting any narratives in a word processing program and then pasting it into the USAP plan. Typing text does not prevent the system from timing out. If the system times out before you save, you will lose your work. Save your work often!

1. Consultation	2. Progress Review	3. Rating	4. Formula	5. Critical Elements	6, 7. Narratives	Documents	Notes	Save	Print
Critical Element 2. Leading People					(Minimum weight 5%)		Weight 5 %		
<p><b>Mandatory Performance Requirement:</b> Designs and implements strategies that maximize employee potential, connects the organization horizontally and vertically, and fosters high ethical standards in meeting the organization's vision, mission, and goals. Provides an inclusive workplace that fosters the development of others to their full potential; allows for full participation by all employees; facilitates collaboration, cooperation, and teamwork, and supports constructive resolution of conflicts. Ensures employee performance plans are aligned with the organization's mission and goals, that employees receive constructive feedback, and that employees are realistically appraised against clearly defined and communicated performance standards. Holds employees accountable for appropriate levels of performance and conduct. Seeks and considers employee input. Recruits, retains, and develops the talent needed to achieve a high quality, diverse workforce that reflects the nation, with the skills needed to accomplish organizational performance objectives while supporting workforce diversity, workplace inclusion, and equal employment policies and programs.</p>									
Agency-Specific Performance Requirements:									

#### Add text to Critical Element 5

1. Scroll down the page to **Critical Element 5** and click inside the **Performance Requirement** box to add text.
2. Under **Strategic Alignment**, indicate the agency strategic or operational goal to which the requirement is aligned.
3. Select **Save** at the top of the page.
4. To add an additional performance requirement, select the **Add Performance Requirement** button at the bottom of the page and repeat the steps above.

Critical Element 5. Results Driven		(Minimum weight 20%)	Weight 20 %
<p><b>Performance Requirement:</b></p> <p>Improve XMGP grant obligation rate for compliant projects by 7% of FY14 baseline by Sept 1, 2015.</p>	<p><b>Strategic Alignment:</b></p> <p>agency strategic goal 3.1 Become an expeditionary agency; and XMGP program strategic goal 4.3 Advance Community Resiliency and Sustainability</p>	<p><b>Delete</b></p>	
<p><b>+ Add Performance Requirement</b></p>			

## Enter Critical Element Weights

1. To enter critical element weights, type a value into each of the **Weight** fields and click **Save**.

- Critical Elements 1-4 have a minimum weight of 5% and a maximum weight of 20%.
- Critical Element 5 has a minimum weight of 20% and a maximum weight of 80%.
- When weighting the performance requirements, the weight must total 100%.

**NOTE:** Weight Restrictions vary by agency. Reference agency-specific policy to ensure compliance with weight restrictions. **NIH Specific Performance Requirement for ALL SES, SL (Supervisors), and SENIOR-LEVEL TITLE 42 EMPLOYEES are in the current year guidance.**

Critical Element 1. Leading Change	(Minimum weight 5%) Weight 20 %
Develops and implements an organizational vision that integrates key organizational and program goals, priorities, values, and other factors. Assesses and adjusts to changing situations, implementing innovative solutions to make organizational improvements, ranging from incremental improvements to major shifts in direction or approach, as appropriate. Balances change and continuity; continually strives to improve service and program performance; creates a work environment that encourages creative thinking, collaboration, and transparency; and maintains program focus, even under adversity.	
Agency-Specific Performance Requirements:	
<div>22</div> <div>Develop a strategic plan by August 15, 2015, to streamline processes and improve accuracy and timeliness of the delivery of funds and services to grantees.</div>	

## Edit a Performance Plan

1. Scroll down to the performance requirement section you wish to edit and click in the **Performance Requirement** or the **Strategic Alignment** fields to edit the text.
2. To delete an entire performance requirement, select the red **X** box next to the performance requirement you wish to delete. You will only be able to delete an optional performance requirement.
3. Click **Save** at the top of the page.



**TIP:** Once a plan is signed by the Executive and/or the Rating Official, signatures have to be removed before changes can be made to the plan. To remove a signature from a plan, select the "Remove" button that appears next to your signature. Removing a signature will also remove others' signatures.

## Sign Your Performance Plan

**ONCE YOUR RATING OFFICIAL HAS SIGNED YOUR PLAN, YOU WILL BE ABLE TO SIGN YOUR PLAN.** On the Dashboard, under **Tasks Requiring My Attention**, you will see **Sign My Consultation**.

1. To sign the plan, select **Sign Own Plan**.

Tasks Requiring My Attention	
<b>My Active Plans</b> <a href="#">Review My 2016 Plan</a> <a href="#">Sign My 2019 Consultation</a>	<b>My Employees' Plans</b> You have no pending tasks for your employees' plans.

2. In Part 1, next to the **Executive's Signature**, select **Sign**.
3. When the prompt **Are you sure you want to sign this Performance Plan?** appears, select **Yes**.

Part 1. Consultation. I have reviewed this plan and have been consulted on its development.	
Executive's Name (Last, First, MI): DRAPER, DON	Appraisal Pd. 10/1/2014 - 9/30/2015
Are you sure you want to sign this Performance Plan? <b>Yes</b> <b>No</b> Executive's Signature: <input type="text"/> <b>Sign</b>	Date: <input type="text"/>
Title: Director	Organization: Sterling Cooper Draper Price
Rating Official's Name (Last, First, MI): STERLING, ROGER	<input checked="" type="checkbox"/> CA <input type="checkbox"/> NC <input type="checkbox"/> LT/LE
Rating Official's Signature:  Signed by STERLING, ROGER	Date:  5/26/2015

**NOTE:** You will not be able to type your name or the date in the boxes. When you select "Yes" to assign the plan, your name and date will automatically appear in the respective boxes.



## Part 4: Monitoring Phase

Progress Review occurs after the performance plan has been created and the initial consultation and signatures have been completed. In Progress Review phase, you have the ability to take the following actions:

- Edit or add additional text to the critical elements to include agency-specific requirements
- Add a performance requirement and provide strategic alignment
- Edit or remove performance requirements
- Sign progress reviews as the Executive
- Add supporting documentation
- Print performance plans

**NOTE:** The actions listed above occur initially in the planning phase, but can be repeated during the progress review phase if a plan requires revisions. However, in order to edit critical elements, add a performance requirement, or edit or remove a performance requirement during the monitoring phase, the Rating Official and the Executive must un-sign the plan, make any necessary revisions, and then re-sign the plan. To un-sign the plan, select the "Remove" button, which appears next to your signature in the performance plan. This will remove all signatures.

### BEFORE YOU BEGIN

- **PRIOR TO SIGNING A PROGRESS REVIEW PLAN IN USA PERFORMANCE, THE RATING OFFICIAL AND THE EXECUTIVE MUST FIRST MEET TO DISCUSS THE PLAN.**
- **THE PLAN IS REQUIRED TO BE SIGNED IN SEQUENTIAL ORDER WITH THE RATING OFFICIAL SIGNING FIRST FOLLOWED BY THE EXECUTIVE.**
- **BEFORE ADDING SUPPORTING DOCUMENTATION TO USA PERFORMANCE, VERIFY THAT YOUR DOCUMENT(S) ARE ACCURATE, PROOFED AND EASY TO READ PRIOR TO UPLOADING IN THE SYSTEM.**
- **VERIFY DOCUMENTS TO BE UPLOADED ARE RELEVANT TO THE RATING PHASE. FOR EXAMPLE, AN ACCOMPLISHMENT NARRATIVE MAY NOT BE APPROPRIATE TO UPLOAD DURING THE CONSULTATION PHASE OF THE RATING CYCLE.**



**TIP:** *If an employee signature is removed, the plan will stay in the Monitoring phase. Notification is not received if a signature has been removed. A plan must be opened to determine if signatures have been removed. The Performance Management Page will display a plan if a signature is removed during the planning phase.*

### Progress Review Signatures

1. After the **Rating Official** signs, the **Executive** can sign.

Part 2. Progress Review		Notes
Executive's Signature: 	 <b>Sign</b>	Date: 
Rating Official's Signature: 	Signed by SCHMIDT, LINDA	Date:  3/13/2017
Reviewing Official's Signature (Optional): 		Date: 
<input type="checkbox"/> Request Reviewing Official Signature		

2. Select the **Request Reviewing Official Signature** box to request a higher level review.

### Add Supporting Documentation

1. Select **Performance Management** on the navigation bar and click on the individual's name to view an employee's Performance Plan.
2. Click the **Documents** icon at the top of the plan or scroll to the bottom of the page and select **Add Document**.
3. Enter a **Description** (optional).
4. Choose a file to upload by clicking **Browse**.
5. Select a **Document Type** from the dropdown menu (optional).
6. Enter text in the **Comments** textbox (optional).

**NOTE:** Documents can be accessed by clicking the documents icon the top of the performance plan page and scrolling down to the bottom of the page of the performance plan

7. Click **Save Changes**.
  - The details of the uploaded document should be listed in the **Employee Documents** table at the bottom of the page.

### Document Details

Do not include the following types of information in your uploaded documents: classified information, as defined in Executive Order 13526 (dated December 29, 2009); Social Security Number (SSN); or other personal or sensitive information.

**Description:**

Draper FY15 accomplishments

**Document To Upload:** H:\USAP notes\Draper ac **Browse...**

(PDF, Word, or Excel files only)

**Document Type:** Self-Accomplishments


**Comments:**

updated 3/25/15

Cancel **Save Changes**

8. Click **Delete** in order to remove the document.



Employee Documents				Search: <input type="text"/>
File Name ^	Comments ^	Updated By ^	Uploaded Date ^	Action
Draper accomplishments.docx		Draper, Don	5/28/2015 2:55:05 PM	

## Part 5: The Rating Phase

*The rating phase occurs at the end of the performance appraisal period. After the monitoring phase is complete, the performance plan will enter the rating phase and notify you to Sign Plan or Sign Own Plan. To add narratives, ratings and signatures, open your employee's performance plan.*

### BEFORE YOU BEGIN

- Take notes throughout the rating period in order to assist in the drafting of the self-accomplishment narrative and the summary rating narrative.

### Executive's Accomplishment Narrative

- As an Executive, you have the option to document your accomplishments for the rating period in **Part 7. Executive's Accomplishment Narrative**, but it is not required.
- Click on **Narratives** at the top of your performance plan.
- Enter text into **Part 7 Executive's Accomplishment Narrative** textbox.
- Select **Save** at the top of the page.



**TIP:** Due to system timeouts, we recommend drafting any narratives in a word processing program and then pasting it into the USAP plan. Typing text does not prevent the system from timing out. If the system times out before you save, you will lose your work. Save your work often!

- To re-release your narrative to the Rating Official, select **Send to Rating Official**

**Part 7. Executive's Accomplishment Narrative (Recommended)**

Type your narrative here.

Are you sure you want to notify your Rating Official that your Narrative is complete?  
Notification will be sent upon saving the Evaluation.

☒ **Send to Rating Official**

- You have the option to send your Rating Official your narrative by selecting the **Send to Rating Official** checkbox.
- If selected, the Rating Official will receive an alert to **Review Executive Summary and Sign**; otherwise, your narrative can only be seen by you.
- You also have the option to recall your narrative by selecting **Enable Edit and Re-release**.
- If selected, the Rating Official will no longer be able to view your narrative and you will be able to make changes to your narrative.

**Part 7. Executive's Accomplishment Narrative (Recommended)**

Edit your Narrative here.

Are you sure you want to un-release your Executive Accomplishment Narrative?

☒ **Enable Edit and Re-release**

## Executive Signature

[Login](#) → [Home](#) → [Performance Management](#)

Once the performance plan has been rated and signed by your Rating Official and the Higher Level Reviewer (if required), you will have the opportunity to review their ratings and sign the plan under **Part 3. Summary Rating**.

1. Prior to signing the plan, you have the option to **Request a Higher Level Review**.

- Before selecting the **Request a Higher Level Review** checkbox, you should upload a justification to **Employee Documents** explaining why you disagree with the rating.

*Higher Level Review* (If applicable)

☒ **Request a Higher Level Review**

Are you sure? Clicking "Yes" will request a Higher Level Review AND sign your plan. If you want to upload rating response documents before requesting this review, please click "No," upload your documents in the Employee Documents section below, and then sign/request a Higher Level Review.

Yes No

Executive's Initials:



**TIP:** *If a Higher Level Review has already been conducted based on agency specific policy, the Agency Administrator will be notified to assign the performance plan to another Higher Level Reviewer.*

### Print a Performance Plan

- Select the **Performance Management** link from the top navigation bar.
- Select the name of the plan to be viewed.

USA Performance® Home **Performance Management** Reports Resources

### Performance Management - All Users

Name	Rating Cycle Group	Plan Begin Date	Plan End Date
<b>Collins, Adrian</b>	Fiscal Year Rating Cycle	5/2/2016	8/11/2016
Collins, Adrian	Fiscal Year Rating Cycle	10/1/2018	9/30/2019

Show 25 entries Showing 1 to 2 of 2 entries

- Select the **Print** icon in the upper right corner.

USA Performance® Home Performance Management Resources Collins, Adrian

1. Consultation 2. Progress Review 3. Rating 4. Formula 5. Critical Elements 6, 7. Narratives Documents Notes Save **Print**

Part 1. Consultation. I have reviewed this plan and have been consulted on its development. Plan Status: Active

Executive's Name (Last, First, MI): COLLINS, ADRIAN	Appraisal Pd. 5/2/2016 - 8/11/2016
Executive's Signature: [Signature]	Date: [Date]
Title: Title For Adrian	Organization: Office of Computer Management
Rating Official's Name (Last, First, MI): [Name]	<input type="checkbox"/> CA <input type="checkbox"/> NC <input type="checkbox"/> LT/LE

- Select **Report pdf** in the lower left corner.

USA Performance® Home Performance Management Reports Resources Thorne, Emily

1. Consultation 2. Progress Review 3. Rating 4. Formula 5. Critical Elements 6, 7. Narratives Documents Notes Save Print

Part 1. Consultation. I have reviewed this plan and have been consulted on its development.

Executive's Name (Last, First, MI): THORNE, EMILY	Appraisal Pd. 10/16/2015 - 10/16/2016
Executive's Signature: [Signature]	Date: [Date]
Title: [Title]	Organization: Sammy
Rating Official's Name (Last, First, MI): [Name]	<input type="checkbox"/> CA <input type="checkbox"/> NC <input type="checkbox"/> LT/LE
Rating Official's Signature: [Signature]	Date: [Date]

Critical Element 1. Leading Change (Minimum weight 5%) Weight: 20 %

Mandatory Performance Requirement: Develops and implements an organizational vision that integrates key organizational and program goals, priorities, values, and other factors. Assesses and adjusts to changing situations, implementing innovative solutions to make organizational improvements, ranging from incremental improvements to major shifts in direction or approach, as appropriate. Balances change and continuity; continually strives to improve service and program performance; creates a work environment that encourages creative thinking, collaboration, and transparency, and maintains program focus, even under adversity.

**Report (23) pdf** Show all

- Select the **Print** icon in the upper right corner.

SES Printed Evaluation 1 / 4

SES Performance Management System Executive Performance Plan

Part 1. Consultation. I have reviewed this plan and have been consulted on its development.

Executive's Name (Last, First, MI): THORNE, EMILY	Appraisal Pd. 10/16/2015 - 10/16/2016
Executive's Signature: [Signature]	Date: [Date]
Title: [Title]	Organization: Sammy
Rating Official's Name (Last, First, MI): [Name]	<input type="checkbox"/> CA <input type="checkbox"/> NC <input type="checkbox"/> LT/LE
Rating Official's Signature: [Signature]	Date: [Date]

Part 2. Progress Review

Executive's Signature: [Signature]	Date: [Date]
Rating Official's Signature: [Signature]	Date: [Date]
Reviewing Official's Signature (Optional): [Signature]	Date: [Date]

Part 3. Summary Rating

Initial Summary Rating	<input type="checkbox"/> Level 5 Outstanding	<input type="checkbox"/> Level 4 Exceeds Fully Successful	<input type="checkbox"/> Level 3 Fully Successful	<input type="checkbox"/> Level 2 Minimally Satisfactory	<input type="checkbox"/> Level 1 Unsatisfactory
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Rating Official's Name (Last, First, MI): [Name]

Rating Official's Signature: [Signature] Date: [Date]

Executive's Signature: [Signature] Date: [Date]

Reviewing Official's Signature (Optional): [Signature] Date: [Date]

Higher Level Review (if applicable)

☐ I request a higher level review. Executive's Initials: [Initials] Date: [Date]

Higher Level Review Completed: ☐ Date: [Date]

Higher Level Reviewer Signature: [Signature] Date: [Date]

## PART 6: USAP HELP DESK SUPPORT

Login → Home → Resources

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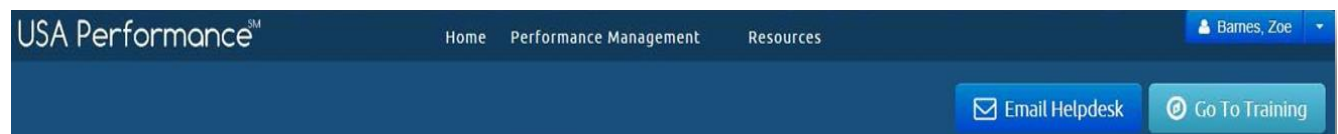
*Users can contact the USAP Help Desk through the USA Performance website as well as e-mail for technical assistance.*

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### Request USAP Help Desk Support

For further questions, contact your designated IC liaison at <https://hr.nih.gov/hr-systems/usa-performance/usa-performance-ic-proxies>.

1. Click **Email Helpdesk**.
2. You can also email the Helpdesk directly at [USAPerformance@opm.gov](mailto:USAPerformance@opm.gov).

The image shows a "Contact the HelpDesk" form. At the top, there is a cursor icon and the title "Contact the HelpDesk". Below the title, there are two input fields: "Subject" with a magnifying glass icon and "Message" with a list icon. At the bottom of the form, there are two buttons: "Send" and "Reset".